



JEFFERY B. LEVI

Director

Trusts & Estates

Oakland

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JEFFERY B. LEVI

In addition to Jeff's experience in estate planning, he has a background in corporate and transactional law, which gives him unique insights into advising individuals and families with business interests. Jeff works closely with clients to devise strategies and creative solutions to meet their objectives. He is certified by the State Bar of California Board of Legal Specialization as a specialist in estate planning, trust, and probate law.

Estate Planning

Jeff works with individuals and families to plan and structure their estates. He prepares revocable trusts, irrevocable generational trusts, wills, durable powers of attorney, and advance health care directives. With his corporate and transactional skills, Jeff frequently forms and prepares the organizational and operating documents for family businesses (such as family limited partnerships and limited liability companies) to meet clients' estate planning and business objectives.

Business Law

Jeff's experience includes forming, organizing, and counseling limited liability companies, partnerships, and corporations. He has acted as outside counsel for entities on a variety of legal issues, such as buy-sell agreements, duties of directors, and family business succession. Jeff has handled major transactions, including acquisitions, financings, conversions, and dissolutions, and advises clients about their estate planning options when faced with liquidity events or other changes in their businesses. Jeff also has substantial experience with forming, counseling, and obtaining tax-exempt status for nonprofit organizations.

- Trusts & Estates
- Estate Planning

EDUCATION

- J.D., University of San Francisco, School of Law, *cum laude*
- B.A., Pomona College, California

AREAS OF PRACTICE

OTHER EXPERIENCE

- Nonprofits and Trade Organizations
- Trusts & Estates
- Estate Planning

AWARDS AND HONORS

- Super Lawyer, *Northern California Super Lawyers®*, 2014-2019, 2025
- Rising Star, *Northern California Super Lawyers®*, 2009-2010

ARTICLES AND PRESENTATIONS

- Author, "Keeping Your Family Business Intact from One Generation to Another" *Oakland Business Review*, May 24, 2019
- Author, "Tax Strategies For Family-Owned Businesses?" *Financial Advisor*, September 07, 2016

PROFESSIONAL AND COMMUNITY ACTIVITIES

- Member, Trust and Estates and Business Sections, California State Bar
- Past President, East Bay Trusts and Estates Lawyers
- Member, East Bay Tax Club
- Member, East Bay Estate Planning Council

ADMISSIONS

- California